

For use by
financial advisers only
Unsuitable for use
by private investors

International intermediaries Why partner with us?

Rathbones
Look forward

We want to help you grow your business. With our extensive range of investment services, we can help you meet the needs of your existing clients as well as identify new opportunities within the market.

Alongside funds in multiple currencies and collective portfolios, we provide individual discretionary investment portfolios for clients with £500,000 or more to invest. As a specialist in discretionary investment management, we have the scale to provide high quality service at a competitive price. We then pass on this benefit to your clients through competitive fees.

By working with investment professionals with experience at preserving and growing wealth over the long term, you can secure greater choice for your clients while at the

same time mitigating the risk to your business. This level of service is available to you as a cost effective alternative to investing in funds.

We also like to reward strong partnerships, so we're able to offer preferential terms that are linked to the amount of business you choose to do with us.

Multi-asset funds

£1,000+

Rathbones multi-asset funds available in £, €, \$ (€ and \$ hedged)*†

Unitised portfolio service

£100,000+

Unitised portfolio service available in £, €, \$ for discretionary clients**

Individual portfolio service

£500,000+

Individual discretionary portfolios available in major currencies**

†UCITS V Luxembourg SICAV
*€2,000 or \$2,000 minimum investment size
**or equivalent in € or \$

Our proposition

Type	Advisory	Discretionary	Discretionary
Minimum investment size	£1,000+*	£100,000+**	£500,000+**
Investment universe	Direct equities Direct bonds Collectives	Direct equities Direct bonds Collectives	Direct equities Direct bonds Collectives
Access	Third party platforms	Rathbones via dedicated investment manager	
Currencies	£, €, \$ (€ and \$ hedged)	Managed in £, €, \$ strategies	In major currencies

Why Rathbones?

Who we are

- as part of Rathbone Brothers Plc, a FTSE 250 company, managing more than £35.8 billion* for our clients, we're one of the UK's leading investment managers.

Growing global coverage, local expertise

- our dedicated investment team provides specialised solutions for global clients
- additional, regular and local engagement with our expert international business development team.

Tailored investment

- our client portfolios are based on a risk-targeted approach relevant to the individual
- a forward-looking view of asset allocation
- assessment of individual financial circumstances and investment objectives.

Dedicated adviser support

- 24/7-access to investment, market and portfolio information
- local events such as best practice seminars and investment forums.

Complete client support

- regular transparent, straightforward and comprehensive reporting for you and your clients
- access to investment communications with a free subscription service and informative website articles
- a host of additional expert services, including Rathbone Greenbank Investments, with a focus on ethical, sustainable and environmental opportunities.



The competitive advantage

- forward-looking asset allocation frameworks that deliver consistent risk-adjusted results
- no dominating corporate influence, our loyalties lie with you and your clients; we understand the importance of targeting risk rather than merely chasing returns.

*As at 5 April 2017. Includes funds managed by Rathbone Unit Trust Management

For more information, contact your Rathbones investment director or call our international business development team on +44 (0)20 7399 0800 or email international@rathbones.com or for more information, please visit rathbones.com

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 rathbones.com
 Rathbone Brothers Plc

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